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ABSTRACT

This instructor's guide and student activity packet (together with a slide/tape presentation not available here) comprise a module for the postsecondary office occupations education competency area of business telephone etiquette. Modules for other competency areas are available separately (see note). The purpose stated for the module is to help students develop and refine the communication skills and techniques needed by every employee who uses the telephone to conduct business. The instructor's guide includes an introduction, performance objectives, special notes to instructor, time and facilities, suggestions for discussion, optional student activities, suggested evaluation criteria, keys to student activities, the narrative for the slide/tape presentation, and a list of resources and references. Contents of the student activity packet include an introduction, performance objectives, necessary resource materials, directions for completing the activities provided, a student checksheet for taking notes during the slide/tape presentation, and the activities to be completed in order to master the competencies on which the module is based. (YLB)

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OFFICE OCCUPATIONS

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BUSINESS TELEPHONE ETIQUETTE

Audiovisual Package

Instructor's Guide
Student Activity Packet

Prepared by Diane E. Johnson

Published by
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BUSINESS TELEPHONE ETIQUETTE

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INTRODUCTION

This module, made up of a slide/tape presentation and accompanying printed materials, was developed as a result of a proposal funded by the Texas Education Agency to the Occupational Curriculum Laboratory at East Texas State University. Based on the results of a needs assessment of selected postsecondary office occupations instructors from across the state of Texas, this and several other modules were developed to provide instructional materials in competency areas that require formal classroom training. Selected postsecondary office occupations instructors assisted in the development, field review, and evaluation of the final product. To further insure the usability of these products, they were evaluated by members of a business advisory committee and tested by postsecondary office occupations students.

All of the materials in these modules have been developed with student needs and interests in mind and are designed with the flexibility for use as supplementary or primary teaching aids in many of the office occupations classes. The overall reading level of the printed material in this particular package is 10.09 as calculated according to the FOG Index. Overall reading level of the script is 11.23. In general, these reading level scores are consistent with those which can be expected of postsecondary students. The added audio and visual stimuli help insure understanding by those students whose reading levels do not meet these expectations.

Included in each slide/tape package are a set of full-color slides, a script, a cassette tape, an instructor's guide, and a student activity packet. Each instructor's guide includes general instructions for use by an individual or in a group setting, the narrative for the slide/tape presentation, and specific instructions on how to use the materials in a particular package. The specific instructions section contains the performance objectives, suggestions for class discussion, special notes to the instructor, optional student activities, solutions for the activities completed by the students, and suggestions for evaluation of the work produced.

The student activity packet consists of a section on information the student must know in order to complete the activities, the performance objectives to be attained, any necessary resource materials, and the activities to be completed in order to master the competencies on which the module is based.

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We extend special thanks to the following committee members and their employers for their cooperation in reviewing, evaluating, and testing the materials developed through this project:

Business Advisory Committee

Nancy Hunsucker, Administrative Manager, Kelly Services

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In addition to these specific individuals, selected students at Tarrant County Junior College, South Campus, have tested these materials in their draft form and have provided valuable input for assuring that the final product meet the needs of the students for whose use this instructional package is intended.

Appreciation is also given to the following individuals, businesses, and institutions for their support, cooperation, and technical assistance.

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INSTRUCTOR'S GUIDE

BUSINESS TELEPHONE ETIQUETTE

INSTRUCTOR'S GUIDE

GENERAL INSTRUCTIONS

Equipment Needed

Before using this presentation, make sure that arrangements have been made to have the following equipment available: a slide projector, a projection screen, and a cassette recorder/player.

Make sure that all equipment is working properly.

Preparations Before Class

1. Preview the slide/tape presentation and determine how it will be used in your class.
2. Plan short but relevant introductions to tell students what to look for in the slide/tape presentation.
3. Allow enough time to show the presentation in its entirety.
4. If you use handouts, be sure they are distributed after the presentation.

Procedures for Group Setting

1. Choose a point in the lesson where the slide/tape presentation will have the greatest impact.
2. After showing the slide/tape presentation, ask students to give highlights in their own words.
3. If necessary, show the presentation or parts of it again to emphasize points important to successful completion of the activities.
4. If necessary, make arrangements for students to use the slide/tape presentation on an individual basis.

Procedures for Individual Setting

1. Make sure space and equipment are available.
2. Check equipment to make sure it is working properly.
3. Demonstrate procedures for using the equipment.

4. Have students view the slide/tape presentation as many times as necessary to understand the information given.

Instructions for Using Slides and Cassette Tapes

1. Pick up each slide by its frame so that you do not touch the film.
2. Arrange the slides in the slide tray in sequential order with the slide number in the upper right corner facing you.
3. Insert the cassette tape in the recorder/player.
4. Rewind the cassette tape to be sure it will start at the beginning.
5. Turn on the slide projector. The first slide should be projected on the screen.
6. Start the cassette player.
7. Depress the advance button at the sound of the "beep" if you are using the audible advance.

(NOTE: Review the above procedures with those students who will be using the package individually.)

Student Checksheets

Student checksheets provide a convenient means for the student to take notes while viewing the slide/tape presentation. The points identified on the student checksheets are those the student will have to be familiar with in order to complete the activities provided.

Resource Sheets

Resource sheets contain information essential to the activities and serve as reinforcement for the competency requirements covered by the slide/tape presentation. Students should use the resource sheets as instructed in each student activity packet.

Activity Sheets

Activity sheets are working papers for students. Students are instructed to use them when completing certain activities.

BUSINESS TELEPHONE ETIQUETTE

INSTRUCTOR'S GUIDE

SPECIFIC INSTRUCTIONS

Introduction

Business Telephone Etiquette is an audiovisual aid developed to help students develop and refine the communications skills and techniques needed by every employee who uses the telephone to conduct business.

This slide/tape package consists of 69 full-color slides, a cassette tape, an instructor's guide, a script, and a student activity packet that could be used as primary or supplementary tools in a wide variety of courses, including business communications and office procedures. Any of these printed materials, which are not copyrighted, can and should be reproduced in order to provide an adequate supply of the materials for completing the activities; there are no separately printed student materials.

Performance Objectives

If a student satisfactorily completes this instructional package, the following competencies can be expected:

1. The student will be able to list six tips for improving telephone efficiency.
2. The student will be able to follow the rules for handling incoming telephone calls.
3. The student will be able to describe the procedures for transferring calls.
4. The student will be able to accurately record telephone messages.
5. The student will be able to follow the appropriate procedures for placing outgoing telephone calls.

Special Notes to the Instructor

This instructional audiovisual package may be used in its entirety in a group setting or as a component of an individualized instruction curriculum. The instructor who desires to adapt this particular package to the specific needs of the program may find the following suggestions helpful:

1. The activities in the Student Activity Packet may be completed in any order assigned by the instructor or desired by the student.

2. Activity 3 requires the student to make decisions based on the time zones in which particular cities are located. Three of the cities in question are located in states that are intersected by a time zone line; therefore, a portion of the state is in one time zone while the remainder of the state is in another. Students need to be aware of the specific locations of Pocatello, Idaho; Memphis, Tennessee; and Lincoln, Nebraska--or they must have access to a map that will enable them to determine the time zone in which each of these three cities is located.

3. None of the activity directions requires the student to produce typewritten copy. The instructor may wish to add this requirement to any or all of the provided activities.

4. The instructor who wishes to present this unit in smaller segments will find logical stopping points immediately following each of these slides: 19 (general information), 27 (answering calls), 34 (transferring calls), 44 (recording messages), 56 (placing calls).

5. If any of the provided activities cannot be used in your setting or if students require additional activities to achieve the performance objectives, refer to the section entitled Optional Student Activities. Neither resource sheets nor activity sheets are provided for these activities.

Script

A script containing a description of each slide and its narration can be found at the end of the Specific Instructions.

Time and Facilities

Approximately 30 minutes of one class period should be set aside for introduction and presentation of the slide/tape, which can be shown in any room that can be darkened or that has carrels equipped with slide carousels and cassette tape players. Field test results submitted by postsecondary students suggest that the activities will require one to two hours for completion.

Suggestions for Discussion (for use in a group setting)

1. Before the slide/tape is presented, discuss with the students the performance objectives that must be met. Also discuss the importance of business telephone etiquette and the differences between that and personal telephone etiquette.

2. Before presenting the slide/tape, have various students discuss how they answer the telephone at home and whether or not they volunteer to take messages. Compare and contrast their responses to what takes place in the business office.

3. Either before or after the slide/tape has been used, but before the activities are assigned, review the usage of the telephone directory. Bring to class samples of telephone directories of varying sizes, samples of the white pages and yellow pages of the telephone directory, and samples of the home and business telephone directories. (These can be obtained from the local telephone company office.) Point out the various sections of the directory and the types of information that can be found in it.

4. If possible, invite a resource person from the local telephone company office to discuss the technological advances that have been made in the industry and the equipment that is now available. Ask the speaker to provide samples or pictures of some of the newest equipment on the market.

5. Contact the local telephone company and/or phone store for brochures and pamphlets that contain information about the telephone company, its services, and its equipment. Discuss those points that you determine would be of value to your students.

Optional Student Activities

Four activities are provided in the Student Activity Packet. These activities are designed to reinforce the information provided on the slide/tape presentation and to give students an opportunity to demonstrate the telephone skills they now possess.

The following suggestions for additional activities may be used with students who need further skill refinement in these competencies or in courses where the provided activities are inappropriate.

1. If this presentation is used in a group setting, arrange to take the students on a field trip to the local telephone company. Ask to have a representative of the company explain the functions of the various personnel and the divisions in which they are employed.

2. Have each student investigate and write a report on one technological advance in the area of telephone communications. If this presentation is used in a group setting, have selected students give their reports orally; if used in an individualized setting, have students prepare written reports.

3. Have the students role play the situations described in Activity 2 in the Student Activity Packet. Record the conversations; then have the class as a whole critique the role playing.

4. Using the situations described in Activity 1 in the Student Activity Packet, source material provided by the telephone company, or brief sketches developed by the instructor, prepare a cassette tape on which various callers leave messages. Have the student(s) record the appropriate messages; then evaluate the messages taken for neatness, completeness, and accuracy.

5. If this presentation is used in a group setting, have the students work in small groups to develop and present role playing situations that focus on one or more of the aspects of telephone communications.

6. Request and use films and other support materials available through your local telephone company.

7. Arrange with the appropriate secretaries, administrators, and teachers to have students, during the regular class period or during other scheduled hours of the day, answer the telephone in the departmental office or in other administrative offices.

8. Ask one of the school secretaries to conduct a brief "inservice" for the students on how to handle telephone communications for the school. Have the secretary conduct the inservice session as though the students were new office employees.

Suggested Evaluation Criteria

The following is a checklist that can be used when evaluating the student's successful completion of this packet. This checklist is not intended as a method of grading but merely as a means of determining whether or not the student has mastered the competencies presented in the package.

1. Activity 1
   a. The student responded to each of the ten situations. _____
   b. The student's responses were prepared neatly and accurately. _____
   c. Question 1
      (1) The student's response would include an explanation of the necessary delay in getting the information. _____
      (2) The student's response would give a suggested time at which the information would be available. _____
   d. Question 2
      (1) The student's response would include asking the caller to "hold." _____
      (2) The student's response would include telling Mr. Alexander who is calling and the purpose of the call. _____
   e. Question 3
      (1) The student's response would include informing the caller that Mr. Alexander is not available. _____
      (2) The student's response would include taking a message. _____

f. Question 4

(1) The student's response would include changing Ms. Popokolis' appointment. _____

(2) The student's response would include leaving a message for Mr. Alexander about the cancelled appointment. _____

g. Question 5

(1) The student's response would include telling Mr. Burns that Mr. Alexander is in the advertising department. _____

(2) The student's response would include offering to take a message and deliver it immediately OR offering to transfer the call to the advertising department. _____

h. Question 6

(1) The student's response would include telling Mrs. Alexander that Mr. Alexander is in a meeting. _____

(2) The student's response would include taking a message. _____

i. Question 7

(1) The student's response would include informing the caller that the deadline for accepting applications has passed. _____

(2) The student's response would include maintaining good will with the caller. _____

j. Question 8

(1) The student's response would include informing Mr. Goldberg that Mr. Alexander is out of the office. _____

(2) The student's response would include offering Mr. Goldberg the option of "holding" until Mr. Alexander returns or of having Mr. Alexander return the call. _____

k. Question 9

(1) The student's response includes taking a message. _____

(2) The student's response includes immediately informing Mr. Alexander of the situation. _____

l. Question 10

(1) The student's response would include informing Mr. Burns that Mr. Alexander is not in the office at this time. _____

(2) The student's response would include taking a message. _____

(3) The student's response would include gathering the necessary materials if possible. _____

m. Message forms were completed for

(1) Question 3, Mr. Louis Longforth _____

(2) Question 4, Ms. Anita Popokolis _____

(3) Question 6, Mrs. Alexander _____

(4) Question 8, Mr. Stanley Goldberg _____

(5) Question 9, power and light company _____

(6) Question 10, Mr. Samuel Burns _____

n. The message forms were completed neatly and accurately. _____

o. The messages forms contained complete information. _____

p. The messages taken were stated clearly and concisely. _____

2. Activity 2

a. The responses were neatly and accurately recorded. _____

b. The student responded to each of the three situations. _____

c. Call 1

(1) The student immediately provided identification and the purpose of the call. _____

(2) The student reminded Mr. Estaban of the event to be chaired, the date on which the event was scheduled, and the need for committee members' names. _____

(3) The student response was well phrased, pleasant, and courteous. _____

d. Call 2

(1) The student gave the switchboard the name of the office (person) being called. _____

(2) The student immediately provided identification and the purpose of the call. _____

(3) If the student chose to hold, the conversation with Ms. Washington included the event to be chaired, the date on which the event was scheduled, and the need for committee members' names. _____

(4) If the student chose to have Ms. Washington return the call, a name and a telephone number were provided to the secretary. _____

(5) The student's responses were well phrased, courteous, and pleasant. _____

e. Call 3

(1) The student immediately provided identification and the purpose of the call. _____

(2) The student left a complete and accurate message, including the event to be chaired, the date on which the event was scheduled, and the need for committee members' names. _____

(3) The student's response was well phrased, pleasant, and courteous. _____

3. Activity 3

a. The student responded to each of the fifteen items. _____

b. The information was recorded neatly. _____

c. The times were recorded accurately. _____

4. Activity 4

a. The student responded to each of the ten items. _____

b. The information was recorded neatly. _____

c. The telephone directory sections were correctly identified. _____

d. The telephone numbers were those sought. _____

5. Completion time for activities

a. Completion time less than suggested time limits. _____

b. Completion time within suggested time limits. _____

c. Completion time exceeded suggested time limits. _____

Keys to Activities

Specific answers are provided only for Activity 3.

Answers to Activity 1 will vary according to the student's analysis of the situation; for each situation, however, a recommended list of items to be included in the response is provided. The messages shown on the message forms for Activity Sheet 1B will vary slightly; the answer sheets provided illustrate "suggested" responses.

The dialogue developed by the student in response to the calls in Activity 2 will vary according to each student's language ability, vocabulary, and understanding of business telephone etiquette. A recommended list of items to be included in each response is provided.

Since the answers to Activity 4 will vary by city, a blank answer sheet has been provided in this section. The instructor is urged to locate the correct information and record it on the blank answer sheet to serve as a key to this activity.

Activity 1A

ACTIVITY SHEET 1A

Activity 1

1. *At 9:30 a.m., Ms. Sally Kapoo (555-1245) calls from the downtown office of your company to find out if the weekly production report has been compiled and sent out to the various branch managers. Finding this information will necessitate several telephone calls to various individuals.*

   a. Inform the caller that the information is not readily available.
   b. Mention the need to contact several individuals.
   c. Tell the caller that you will get back to here with the necessary information as soon as possible.
   d. Give the caller some estimate of the time by which you will call back.

2. *At 9:55 a.m., Mr. David Smith from the Accounting Department calls. He wants to talk with Mr. Alexander, the executive vice president, about ways to improve the efficiency of the accounting system presently being used.*

   a. Tell the caller that Mr. Alexander is in.
   b. Ask the caller to hold while you connect him with Mr Alexander.
   c. Inform Mr. Alexander of the caller's name and the purpose of the call.

3. *At 10:10 a.m., Mr. Louis Longforth (555-1221), president of the local Rotary Club, calls to ask Mr. Alexander to speak to that group at their next dinner meeting on June 6. Mr. Alexander is out of the office.*

   a. Inform the caller that Mr. Alexander is not in the office.
   b. Ask the caller if he would like to leave a message.
   c. Ask the caller if he would prefer to call again or if he would prefer to have Mr. Alexander return the call.

4. *At 10:40 a.m., Ms. Anita Popokolis (555-5696) calls to cancel a 1:30 appointment with Mr. Alexander. She wants to reschedule that meeting for any morning next week. You have a copy of Mr. Alexander's calendar at your desk.*

   a. Agree to cancel the original appointment.
   b. Reschedule the appointment, giving the caller a date and time for the new appointment.
   c. Record a message informing Mr. Alexander of the cancellation and rescheduled appointment.

5. *At 1:40 p.m., the company president, Mr. Samuel Burns, calls Mr. Alexander to tell him that the chairman of the board wants to meet with him (Mr. Alexander) in the president's office--immediately. Mr. Alexander is in the Advertising Department looking over some new brochures.*

   a. Inform Mr. Burns that Mr. Alexander is in the Advertising Department.
   b. Offer to transfer the call to the Advertising Department or to take a message and deliver it immediately.

6. *At 2:00 p.m., Mr. Alexander's wife calls to remind him that they are due at a dinner party at 7:30 tonight. She wants him to be sure to be home on time--or even a little early if possible.*

   a. Inform Mrs. Alexander that Mr. Alexander is out of the office.
   b. Offer to take a message.
   c. Record the message.

7. *At 3:30 p.m., Ms. Linda Hale (555-2802) calls to inquire about a job opening for a word processing operator. That position has been advertised for the past week in the local newspaper; the deadline date for accepting applications was yesterday.*

   a. Inform Ms. Hale that the deadline for accepting applications for the position had passed.
   b. Keep the good will of the company by suggesting other jobs or by encouraging the caller to apply again in the future.

8. *At 3:55, Mr. Stanley Goldberg, inventory control supervisor, calls Mr. Alexander regarding a large number of items missing from the equipment storage warehouse. Mr. Goldberg has reason to suspect that certain employees have been "borrowing" these items for use at home. Mr. Alexander has stepped out of the office for a few minutes.*

   a. Inform Mr. Goldberg that Mr. Alexander is out of the office.
   b. Offer Mr. Goldberg the option of holding until Mr. Alexander returns or of having Mr. Goldberg return the call.
   c. If Mr. Alexander is to return the call, record the message and give it to him immediately upon his return.

9. *At 4:00 p.m., the city power and light company calls to inform you that service to your building will be cut off from 7 a.m. until 9:30 a.m. tomorrow. Your employees normally begin work at 8 a.m.*

   a. Record all of the information in detail.
   b. Double check the information by repeating it back to the caller.
   c. Immediately inform Mr. Alexander of the situation.

10. *At 4:40 p.m., Mr. Samuel Burns, the company president, telephones to inform Mr. Alexander that a special board of directors' meeting has been scheduled for noon tomorrow. Mr. Alexander will need to have copies of last week's production figures available for each board member. You have just finished typing that report. Mr. Alexander has left for the day.*

    a. Inform Mr. Burns that Mr. Alexander is not in the office.
    b. Offer to take a message.
    c. Record the message.
    d. If possible, gather the materials that Mr. Alexander will need for the meeting.
    e. As soon as Mr. Alexander arrives in the office in the morning, inform him of the special meeting.

Activity 1B

Message

For Mr Alexander

From Lonnie Longford

Date Current Time 10:10 a.m.

Phone No. 555-1121

Telephoned	✓	Please call	
Called to see you		Will call again	

Message: Mr Longford would like you to speak at the Rotary Club dinner meeting on June 6

Call taken by Mfg

Message

For Mr Alexander

From Linda Pogorelc

Date Current Time 10:40 a.m.

Phone No. 555-5696

Telephoned	✓	Please call	
Called to see you		Will call again	

Message: Cancelled 1:30 appointment for this afternoon. I have rescheduled the appointment for (put in date) at (put in time)

Call taken by Mfg

Message *OPTIONAL

For Mr Alexander

From Samuel Burns

Date Current Time 1:40 p.m.

Phone No.

Telephoned	✓	Please call	
Called to see you		Will call again	

Message: The chairman of the board wants to meet with you immediately in Mr. Burns' office

Call taken by Mfg

Message

For Mr Alexander

From Mr Alexander

Date Current Time 2:00 p.m.

Phone No.

Telephoned	✓	Please call	
Called to see you		Will call again	

Message: You are due at a dinner party at 7:30 tonight. Mr Alexander would like you to come home early

Call taken by Mfg

Message

For Mr Alexander

From Stanley Stalling to stay Cool

Date Current Time 3:55 p.m.

Phone No.

Telephoned	✓	Please call	✓
Called to see you		Will call again	

Message: A large number of items are missing from the equipment storage warehouse. Please call immediately

Call taken by Mfg

Message

For Mr Alexander

From City Power & Light Company

Date Current Time 4:00 p.m.

Phone No.

Telephoned	✓	Please call	
Called to see you		Will call again	

Message: Electrical service to the building will be cut off from 7 a.m. until 9:30 a.m. tomorrow

Call taken by Mfg

Message

For Mr Alexander

From Samuel Burns

Date Current Time 4:40 p.m.

Phone No.

Telephoned	✓	Please call	
Called to see you		Will call again	

Message: A special board of directors' meeting has been scheduled for noon tomorrow (same day). You need copies of last month's production figures for each board member (10 are needed)

Call taken by Mfg

Activity 2

ACTIVITY SHEET

Activity 2

Call 1

To: Mr. Estaban Enrico

Committee Responsibility: Citizen of the Year Breakfast, November 3

Dialogue:

Secretary: Good morning, Enrico's; Patricia Stanley speaking.

Response: Caller offers name and purpose of call.

Secretary: One moment, please, and I'll connect you with Mr. Enrico.

Mr. Enrico: Estaban Enrico speaking.

Response: Caller reminds Mr. Enrico of the committee assignment, the date of the event, and the need for committee members' names. Caller is pleasant and courteous.

Call 2

To: Ms. Mildred Washington

Committee Responsibility: City Beautification Week, May 25-31

Dialogue:

Switchboard Operator: Washington, Lewis, and Post, may I help you?

Response: Caller gives switchboard operator the name of the department or person sought.

Switchboard: If you will hold, I'll connect you with Ms. Washington's office.

Secretary: Mildred Washington's office, Michael Adams speaking.

Response: The caller offers name and purpose of call.

Secretary: Ms. Washington has stepped out of the office for a moment. Would you like to hold, or may I have her return your call?

Response: The caller elects to either hold or have the call returned.

If the caller elects to hold, the conversation with Ms. Washington includes a reminder of the committee responsibility, the date of the event, and the need for committee members' names.

If the caller elects to have the phone call returned, the caller provides a name and telephone number to facilitate the return call.

The caller is pleasant and courteous.

Call 3

To: Mr. Edward Chang

Committee Responsibility: Mayor Exchange Day, August 14

Dialogue:

Telephone Answerer: Chang's Market, may I help you?

Response: The caller offers name and purpose of call.

Telephone Answerer: I'm sorry, Mr. Chang is not in today; may I take a message?

Response: The caller leaves a complete message, including the committee responsibility, the date of the event, and the need for committee members' names.

The caller is pleasant and courteous.

Activity 3

ACTIVITY SHEET

Activity 4

COMPANY	SUBJECT HEADING	TELEPHONE NO.
The office supply store nearest your school		
The ambulance service nearest your school		
The main branch of the public library		
The main number for the city government offices		
The landscaping/nursery firm nearest your school		
The child care center nearest your school		
The exterminating service nearest your school		
The florist nearest your school		
The health club nearest your school		
The superintendent's office at the local public school district		

Activity 4

ACTIVITY SHEET

Activity 3

CITY	EARLIEST HOUR	LATEST HOUR
New York City, New York	7 a.m.	4 p.m.
Detroit, Michigan	7 a.m.	4 p.m.
Pocatello, Idaho	7 a.m.	4 p.m.
Denver, Colorado	9 a.m.	6 p.m.
Memphis, Tennessee	8 a.m.	5 p.m.
Portland, Oregon	10 a.m.	7 p.m.
Las Vegas, Nevada	10 a.m.	7 p.m.
Atlanta, Georgia	7 a.m.	4 p.m.
New Orleans, Louisiana	8 a.m.	5 p.m.
Chicago, Illinois	8 a.m.	5 p.m.
Indianapolis, Indiana	7 a.m.	4 p.m.
Miami, Florida	7 a.m.	4 p.m.
Lincoln, Nebraska	8 a.m.	5 p.m.
Los Angeles, California	10 a.m.	7 p.m.
Albuquerque, New Mexico	9 a.m.	6 p.m.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
1	Focus/Synchronize Slide	OCL Logo
2	Title Slide	Business Telephone Etiquette
3	Stop Slide	Before beginning this slide/tape presentation, stop the recorder and locate the Student Checksheet in the Student Activity Packet. This checksheet provides a convenient means of taking notes on those portions of the presentation that you will need to know in order to confidently complete the activities that accompany this slide/tape package.
4	cartoon of a secretary talking on the telephone	(sound of a telephone ringing 5 or 6 times; secretary answers and talks in a bored tone of voice) "Hello." (pause) "Yes, this is Dawson Enterprises; who is this?" (pause) "Okay, Mr. Evans, who do you want to talk to?" (pause) "What do you want to talk to her about?"
5	a planet with cartoon figures talking on telephones in various locations	As unbelievable as it may seem, that type of telephone etiquette--or lack of it--takes place every day, in all parts of the world.
6	an irritated caller	The unsuspecting caller is left in a state of irritation and confusion, and the person who answered the phone often goes on unaware that anything out of the ordinary has happened.
7	a group showing the effects of the lack of telephone etiquette	The repercussions of such telephone exchanges, however, are far reaching. Customers are angered, clients are lost, time and money are wasted, and employers are fired--all because business telephone etiquette has been ignored.
8	David Evans imagining what a poorly organized company Dawson Enterprises is	A good telephone voice and manner are important to anyone who uses the phone--but they are vital to those who use Alexander Graham Bell's invention to conduct business. Many times a customer forms a lasting impression about a company solely as the result of a conversation with a faceless voice at the other end of a telephone line.
9	the secretary from frame 4 and David Evans from frame 8	Think back to that one-sided telephone conversation heard at the beginning of this slide/tape presentation. The bored tone of voice, the careless grammar, the unproductive attitude undoubtedly left David Evans with a poor impression of Dawson Enterprises.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
10	David Evans and Ms. Andrews; he angry and she trying to rectify the situation	You can be sure that when Mr. Evans finally got to talk with Ms. Andrews the frustration and irritation of dealing with that secretary had reached its peak. Ms. Andrews would have to overcome this disadvantage before any profitable exchange could take place.
11	a chart with the cost line extending beyond the edge of the chart	Business costs--including the cost for the time needed to place a telephone call--are increasing almost daily.
12	the chart in frame 11 with efficiency and effectiveness lines increasing and cost line decreasing	Efficiency and effectiveness are in demand as two keys to decreasing these ever-rising costs. In relation to using the telephone, a few basic tips might help to improve efficiency.
13	1. USE BUSINESSLIKE EXPRESSIONS	1. Use businesslike expressions, but avoid using technical language that might confuse the listener.
14	2. KNOW AND USE CALLER'S NAME	2. Always note the caller's name, and use it in the conversation--this will indicate your interest in the person as well as in the message.
15	3. RETURN CALLS PROMPTLY	3. If you must return a call, return it promptly--and apologize for any delays or errors.
16	4. TAKE ACCURATE NOTES	4. Take accurate notes. If you are unsure of a fact or of a person's name, ask for clarification.
17	5. PROJECT A PLEASANT PERSONALITY	5. Put a smile in your voice--speak clearly and distinctly while projecting a pleasant personality.
18	6. FOLLOW-UP TELEPHONE REQUESTS PROMPTLY	6. Always acknowledge telephone requests in writing, as soon as possible after the telephone conversation has taken place.
19	One person with four arms, doing all of these tasks at the same time	In addition to these general hints which pertain to all types of telephone conversations, you must be specifically prepared to answer the telephone, transfer calls, take messages, and place telephone calls.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
20	ANSWERING CALLS	Incoming telephone calls can be handled effectively and efficiently by following five basic rules.
21	a person wearing track shoes and running to answer the telephone	1. Answer the telephone promptly--within the first one or two rings, if possible.
22	a secretary saying, "Good morning, Dawson Enterprises; Lisa Andrews' office."	2. Immediately identify the company or department and yourself. You need only say something like, "Good morning, Dawson Enterprises; Lisa Andrews' office."
23	the secretary in frame 22 saying, "May I tell her who's calling and what the call is in reference to?"	3. If the caller does not respond with a name and the purpose of the call, ask for this information in as tactful a manner as possible. "May I tell her who's calling and what the call is in reference to?"
24	the secretary talking to the supervisor	4. If the caller is unwilling to provide you with that information, do not insist that you have it. Simply inform your supervisor that the caller is reluctant to give you that information.
25	the secretary walking away from the telephone	5. If you must leave the line, give the caller the option of either waiting or having you return the call.
26	a finger poised above the hold button on a telephone	Then, use the hold button if your telephone is equipped with one, or carefully lay the headset down on the table.
27	the secretary looking at a watch	Be sure, however, to return to the line frequently--at least once each minute--to let the caller know that you have not forgotten about the call.
28	TRANSFERRING CALLS	If the person the caller wants to speak with is in another office, you may want to transfer the call to that number. Although the precise mechanics for transferring telephone calls vary, there are several general things that must be done whenever a call is transferred.
29	the secretary saying, "I'm sorry, Mr. Evans is no longer at this number."	First, inform the caller that the number reached is incorrect or that the person called is not at the number dialed.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
30	the secretary saying, "His new number is . . ."	If the correct number is different from that called, give the caller the proper telephone number for future reference.
31	the secretary saying, "May I transfer you to . . ."	Then, ask the caller if you could transfer the call to the appropriate person, and restate the name of the person to whom the call is being transferred.
32	the secretary saying, "Please hold while I transfer . . ."	If the caller agrees to the transfer, ask the caller to "hold" while the transfer is completed.
33	the secretary saying, "I have a transfer call for . . ."	When the correct number has been reached, inform the person who answers that you have a transfer call, giving both the name of the person being called and the name of the caller.
34	the secretary saying, "May I take a message or . . ."	If the caller prefers not to be transferred, offer to take a message or to have the correct party return the call.
35	a telephone message form	Telephone message forms can be purchased at any office supply store or can be made up and printed in your own office or company. If no message forms are available, you can record the necessary information on a sheet of notepaper.
36	the secretary saying, "Mr. Jones is out of the office right now . . ."	When you take a message, begin by being tactful without giving out any unnecessary information. Unless you have been told to give out specific information about where your supervisor or co-worker is, it is usually sufficient to simply say that the person is out of the office or is not available.
37	RECORDING MESSAGES	If the caller insists on the urgency of the situation, offer to take the caller's name, number, and message, adding that you will pass that information on as soon as possible.
38	a telephone message form with this section completed	Then, use a message form or just a pad of paper to record the name of the person called,
39	a telephone message form with this section completed	the name, including the correct spelling, of the caller,
40	a telephone message form with this section completed	the date and time the call was received,

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
41	a telephone message form with this section completed	the caller's telephone number,
42	a telephone message form with this section completed	the instructions for responding to the call,
43	a telephone message form with this section completed	and any message the caller wishes to leave.
44	a telephone message form with this section completed	Finally, add your name or initials to the bottom of the message so that if any questions arise, the right person can provide the answers.
45	PLACING TELEPHONE CALLS	If you have access to a telephone and are expected to answer calls, you should also be prepared to place telephone calls.
46	a telephone directory	One of the basic accessories needed for placing telephone calls is the telephone directory.
47	the white pages or home section of the telephone directory	Most telephone directories are divided into two sections--the white pages, or home section, in which telephone subscribers are listed by name,
48	the yellow pages or business section of the telephone directory	and the yellow pages, or business section, in which businesses are listed according to the products or services they deliver.
49	a yellow pages listing of photographic equipment and supply dealers	In a business office you will be primarily concerned with the yellow pages. This section of the phone book is arranged like a subject file. If you are interested in finding a supplier for cameras and film for your advertising department, you would look under photographic equipment and supplies.
50	a yellow pages listing of employment agencies	If you want to hire a temporary secretary, you would look under employment agencies.
51	a card file, a telephone index, and a personal telephone directory	To make this part of your job easier, keep a card file, a telephone index, or a personal telephone directory of the names and numbers of those people you call frequently.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
52	WHO?	Then, before you place the call, know who you are calling,
53	WHY?	why you are placing the call,
54	WHAT?	the exact information you want to give or receive,
55	WHAT IF . . .?	and what course of action you need to take if the person you are calling is not available.
56	a desk calendar showing time set aside for making telephone calls	If possible, try to set aside time each day to make all of your phone calls, scheduling your calls for those hours when the people you are calling are most likely to be available.
57	a map of the United States illustrating the four time zones	Avoid placing calls during regularly scheduled lunch hours, and be especially aware of the differences in time zones. A call placed from Denver, Colorado, at 3:30 in the afternoon will probably go unanswered in New York City because of the two-hour time difference.
58	the secretary saying, "This is Laura Mix . . ."	When you actually place the call, identify yourself as soon as the phone is answered. By saying something like "This is Laura Mix of Dawson Enterprises; may I speak with Mr. Green," you avoid wasting time and effort.
59	the secretary saying, "I need to get the figures	Once you have the correct party on the line, get directly to the point of the call.
60	the secretary saying "Thank you . . ."	And, when you have said everything that needs to be said, terminate the conversation courteously. A statement such as "Thank you for taking the time to work through this with me" will signal the other party that the conversation is at an end.
61	a globe showing telephone lines crossing and people talking at various locations	The mechanics or techniques that have been presented represent the basics of business telephone etiquette and usage. In just the past few years, telephone technology has increased the potential for greater telephone contact.
62	a programmable telephone	Today there is equipment that will dial a series of programmed telephone numbers at the touch of a button,
63	a telephone receiver with an audible signal	signal when you have an incoming call on a line that is in use,

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
64	a phone labeled OUT TO LUNCH; an arrow to another phone	automatically transfer incoming calls to another number,
65	a picturephone	transmit data and pictures as well as voice signals,
66	a telephone connection to a terminal	enable computers to communicate with one another,
67	the U.S. map with people talking from various places	and allow you to hold a telephone conference with many people in many places at the same time.
68	the secretary talking on the telephone	(music under) Telecommunications, a technical term for the transmission of information by telephone or telegraph, has greatly increased the telephone capabilities of every business. But it is you, the person who does the actual communicating, that enables telecommunications to be effective. (music up)
69	Credits Slide	

RESOURCES AND REFERENCES

Books

Gregg and Community College Division
McGraw-Hill Book Company
Princeton Road
Hightstown, NJ 98520

Executive Secretarial Procedures (1980), Place, Byers, Uthe

The Receptionist: A Practical Course in Office Reception Techniques (1966), Wood, McKenna

Secretarial Office Procedures, College Series (1981), Lee, Brower

MPC Educational Publishers
Milady Publishing Company
3839 White Plains Road
Bronx, NY 20467

Office Procedures (1980), Moon

South-Western Publishing Co.
5101 Madison Road
Cincinnati, OH 45227

Clerical Office Procedures (1978), Pasewark, Oliverio

General Office Procedures for Colleges (1977), Fulton, Woodward, Newhouse

Secretarial Procedures and Administration (1978), Hanna, Popham, Tilton

Periodicals

Geyer-McAllister Publications, Inc.
51 Madison Avenue
New York, NY 10010

Administrative Management (May, 1981, pp. 47-48, 57-58), "Alternatives in Telephone Traffic Management," Griesinger

Administrative Management (April, 1981, p. 84), "Telecommunications," Dzubeck

Office Publications, Inc.
1200 Summer Street
Stamford, CT 06904

The Office (September, 1981, p. 142), "Telecommunications Insights," Jordan

STUDENT ACTIVITY PACKET

BUSINESS TELEPHONE ETIQUETTE

STUDENT ACTIVITY PACKET

Introduction

Although technological advances have greatly increased the capacity of telephone systems, the key to any communication medium remains the communicator. In order to overcome the disadvantage of the "faceless voice," those persons who are expected to communicate over the telephone must learn and use good business telephone etiquette. Such basic functions as placing and receiving telephone calls, transferring calls, recording messages, and terminating calls must be handled correctly if the "faceless voice" is to make a favorable impression.

Performance Objectives

After satisfactorily completing this instructional package, you will be able to:

1. List six tips for improving telephone efficiency.
2. Follow the rules for handling incoming telephone calls.
3. Describe the procedures for transferring calls.
4. Accurately record telephone messages.
5. Follow the appropriate procedures for placing outgoing telephone calls.

Materials

*Student checksheet for use with slide/tape presentation
*Resource sheet for activity 3
*Resource sheet for activities 1-3
*Activity sheets for activities 1-3
Correction materials
Pen or pencil
Typewriter
United States map (or maps of Idaho, Nebraska, and Tennessee)

*These materials are provided as a part of this activity packet.

Directions

This packet contains four activities. Each activity is detailed on the resource sheet which contains instructions and/or needed information. In addition, activity sheets are provided when they are necessary for the completion of the activity. To complete each of the

activities, follow these steps:

1. Carefully read and follow the instructions listed on the Resource Sheet for each activity.

2. Assemble any materials you will need to complete the activity.

3. Complete the work called for in the activity.

4. Check over your work for completeness and accuracy.

When all of the activities have been completed, submit them to your instructor for evaluation.

STUDENT CHECKSHEET

(To Be Used With Slide/Tape Presentation)

This sheet is provided as a convenient means of taking notes during the slide/tape presentation. The answers to the questions presented here will be useful when completing the activities that accompany this presentation.

1. List six tips for improving telephone efficiency.

   a. _____
   b. _____
   c. _____
   d. _____
   e. _____
   f. _____

2. List five rules for handling incoming telephone calls.

   a. _____
   b. _____
   c. _____
   d. _____
   e. _____

3. What procedure should you use in transferring calls?

   a. _____
   b. _____
   c. _____
   d. _____
   e. _____

4. What information should be recorded on a telephone message form?

   a. _____
   b. _____
   c. _____
   d. _____
   e. _____
   f. _____
   g. _____

5. What four pieces of information should you have before placing any outgoing telephone call?

   a. _____

   b. _____

   c. _____

   d. _____

6. When placing a telephone call, at what point should you identify yourself to the answering party?

RESOURCE SHEET

Activities 1-4

Activity 1

Instructions

1. Locate Activity Sheets 1A and 1B.
2. On Activity Sheet 1A, carefully read each description of an incoming telephone call.
3. In the space provided under each description, briefly describe how you would handle the call.
4. If an incoming call requires your taking a message, record the appropriate information on one of the message forms provided on Activity Sheet 1B.

Activity 2

Instructions

Assume that you are employed as secretary to Ms. Alicia Sebastian, director of the local Chamber of Commerce. Ms. Sebastian has asked you to telephone three chamber members to remind them that they have agreed to chair the planning committees for three chamber functions.

1. Locate Activity Sheet 2.
2. Read the sketch outlined for each conversation.
3. In the spaces provided, fill in your portion of the conversation (word for word), reminding each person of the following:
   a. the committee they have agreed to chair.
   b. the date(s) on which the activity will take place.
   c. your need for the names of their committee members before 10 a.m. tomorrow

Activity 3

Instructions

Assume that:

1. You are employed in a firm whose main office is located in Dallas, Texas.

2. You make numerous telephone calls to people in various locations across the United States.
3. All of the offices you call are open from 8 a.m. until 5 p.m., local time.

Using the Time Zone map provided, indicate on Activity Sheet 3, the earliest hour and the latest hour at which you could call each of the cities listed and expect to find someone in the office.

	Earliest Hour	Latest Hour
example: Washington, DC	7 a.m.	4 p.m.

Activity 4

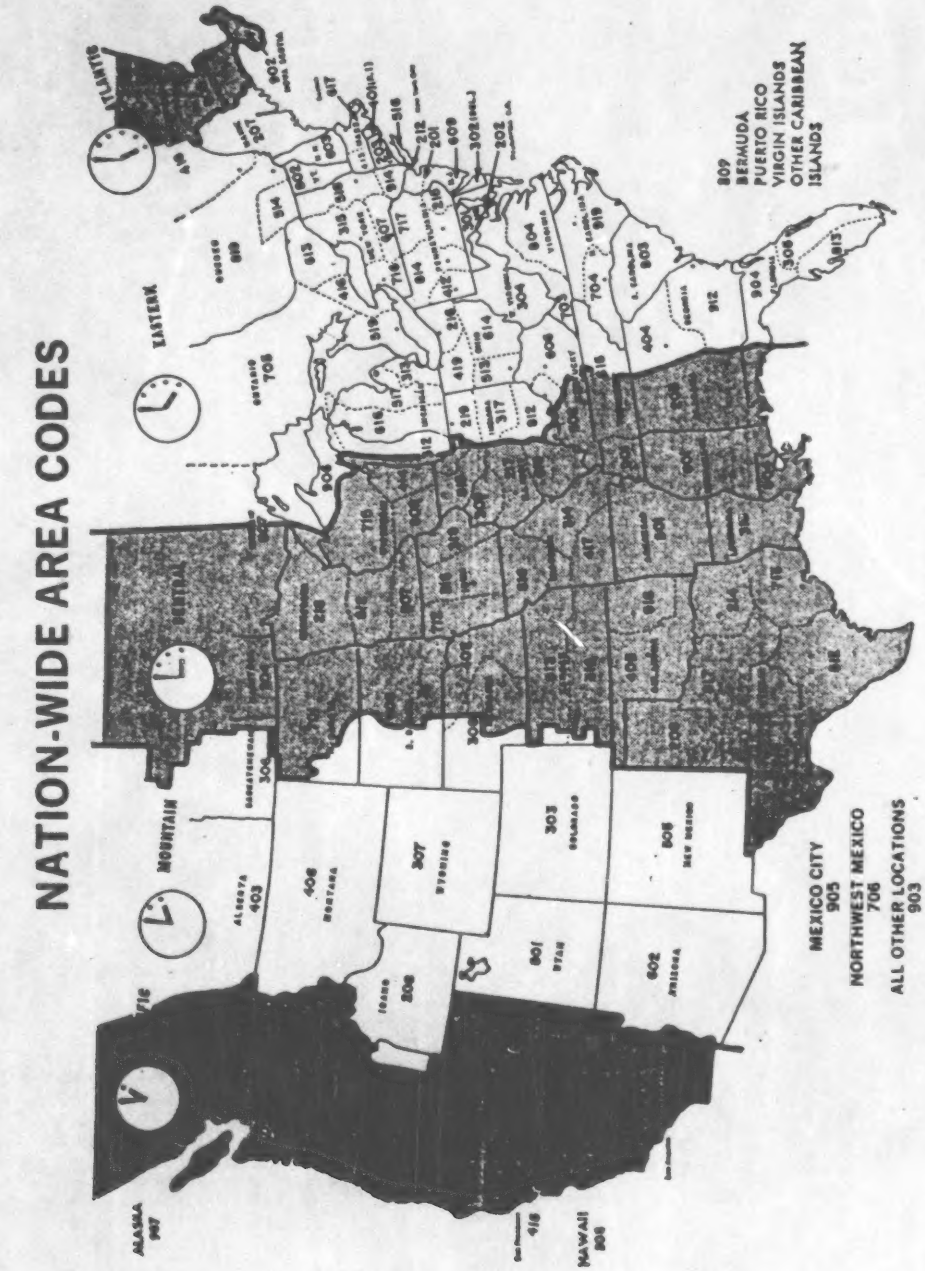
Instructions

1. Locate Activity Sheet 4.
2. Using the local telephone directory, locate the appropriate subject heading under which the business you are seeking would be located.
3. Locate the specific telephone number called for.
4. In the spaces provided next to each business to be located, record:
   a. The subject heading under which you located the business.
   b. The telephone number of the business.

RESOURCE SHEET

Activity 3

* Gulf States-United Telephone Company 1981



Commerce, Texas

43

42

ACTIVITY SHEET 1A

Activity 1

1. *At 9:30 a.m., Ms. Sally Kayes (555-1245) calls from the downtown office of your company to find out if the weekly production report has been compiled and sent out to the various branch managers. Finding this information will necessitate several telephone calls to various individuals.*

2. *At 9:55 a.m., Mr. David Smith from the Accounting Department calls. He wants to talk with Mr. Alexander, the executive vice president, about ways to improve the efficiency of the accounting system presently being used.*

3. *At 10:10 a.m., Mr. Louis Longforth (555-1221), president of the local Rotary Club, calls to ask Mr. Alexander to speak to that group at their next dinner meeting on June 6. Mr. Alexander is out of the office.*

4. *At 10:40 a.m., Ms. Anita Popokolis (555-5696) calls to cancel a 1:30 appointment with Mr. Alexander. She wants to reschedule that meeting for any morning next week. You have a copy of Mr. Alexander's calendar at your desk.*

5. *At 1:40 p.m., the company president, Mr. Samuel Burns, calls Mr. Alexander to tell him that the chairman of the board wants to meet with him (Mr. Alexander) in the president's office--immediately. Mr. Alexander is in the Advertising Department looking over some new brochures.*

6. *At 2:00 p.m., Mr. Alexander's wife calls to remind him that they are due at a dinner party at 7:30 tonight. She wants him to be sure to be home on time--or even a little early if possible.*

7. *At 3:30 p.m., Ms. Linda Hale (555-2802) calls to inquire about a job opening for a word processing operator. That position has been advertised for the past week in the local newspaper; the deadline date for accepting applications was yesterday.*

8. *At 3:55, Mr. Stanley Goldberg, inventory control supervisor, calls Mr. Alexander regarding a large number of items missing from the equipment storage warehouse. Mr. Goldberg has reason to suspect that certain employees have been "borrowing" these items for use at home. Mr. Alexander has stepped out of the office for a few minutes.*

9. *At 4:00 p.m., the city power and light company calls to inform you that service to your building will be cut off from 7 a.m. until 9:30 a.m. tomorrow. Your employees normally begin work at 8 a.m.*

10. *At 4:40 p.m., Mr. Samuel Burns, the company president, telephones to inform Mr. Alexander that a special board of directors' meeting has been scheduled for noon tomorrow. Mr. Alexander will need to have copies of last week's production figures available for each board member. You have just finished typing that report. Mr. Alexander has left for the day.*

ACTIVITY SHEET 1B

Activity 1

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

Message

For_____

From_____

Date_____ Time_____

Phone No._____

Telephoned		Please call	
Called to see you		Will call again	

Message:_____

_____

_____

_____

_____

Call taken by_____

ACTIVITY SHEET

Activity 2

Call 1

To: Mr. Estaban Enrico
Committee Responsibility: Citizen of the Year Breakfast, November 3

Dialogue:

Secretary: Good morning, Enrico's; Patricia Stanley speaking.

Response:

Secretary: One moment, please, and I'll connect you with Mr. Enrico.

Mr. Enrico: Estaban Enrico speaking.

Response:

Call 2

To: Ms. Mildred Washington
Committee Responsibility: City Beautification Week, May 25-31

Dialogue:

Switchboard Operator: Washington, Lewis, and Post, may I help you?

Response:

Switchboard: If you will hold, I'll connect you with Ms. Washington's office.

Secretary: Mildred Washington's office, Michael Adams speaking.

Response:

Secretary: Ms. Washington has stepped out of the office for a moment. Would you like to hold, or may I have her return your call?

Response:

Call 3

To: Mr. Edward Chang

Committee Responsibility: Mayor Exchange Day, August 14

Dialogue:

Telephone Answerer: Chang's Market, may I help you?

Response:

Telephone Answerer: I'm sorry, Mr. Chang is not in today; may I take a message?

Response:

ACTIVITY SHEET

Activity 3

CITY	EARLIEST HOUR	LATEST HOUR
New York City, New York		
Detroit, Michigan		
Pocatello, Idaho		
Denver, Colorado		
Memphis, Tennessee		
Portland, Oregon		
Las Vegas, Nevada		
Atlanta, Georgia		
New Orleans, Louisiana		
Chicago, Illinois		
Indianapolis, Indiana		
Miami, Florida		
Lincoln, Nebraska		
Los Angeles, California		
Albuquerque, New Mexico		

ACTIVITY SHEET

Activity 4

COMPANY	SUBJECT HEADING	TELEPHONE NO.
The office supply store nearest your school		
The ambulance service nearest your school		
The main branch of the public library		
The main number for the city government offices		
The landscaping/nursery firm nearest your school		
The child care center nearest your school		
The exterminating service nearest your school		
The florist nearest your school		
The health club nearest your school		
The superintendent's office at the local public school district		